



27702 Crown Valley Pkwy., D-4 #221, Ladera Ranch, CA. 92694
 949-409-5337 (C) 949-269-7933 (F)
 Email: service@minnisproperty.com

The following information will assist with our onboarding process:

PROPERTY INFORMATION

Street Address	
City	
State	
Postal Code	
Current Property Manager	
Current Property Manger Ph#	
Current Property Manager Email	
Total Square Footage	
Total Units	

OWNER INFORMATION

For Each Owner Provide

Full Legal Name	
Tax ID	
Residence Street Address	
City	
State	
Postal Code	
Mailing Street Address	
City	
State	
Postal Code	
Phone Number	
Fax Number	
Cell Phone Number	
Work Number	
Email	



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TENANT INFORMATION

For *Each Tenant* Provide

Full Name	
Company Name	
Unit #	
Square Feet	
Mailing Address	
City	
State	
Postal Code	
Work Phone Number	
Home Phone Number	
Cell Phone Number	
Email	
Lease Start Date	
Lease End Date	
Total Rent	
Security Deposit	
Last Month's Rent Deposit	
Tax ID	
Additional Contact Full Name	
Company Name	
Mailing Address	
City	
State	
Postal Code	



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Please provide the following documents if available:

Owner(s) / Property Information

Copy of Business License Current
Copy of Fictitious Name Statement
Bank Statement(s)
Current Operating Budget
Last Year's Operating Budget
Current Year Profit and Loss Report
Copy of Owner/Property Insurance Policies
Most Recent Site Inspection Report
ADA Review & Report
Environmental Regulations Report
Roof: Installation Year
Asphalt: Installation Year
Asphalt Maintenance: Type, Year
HVAC Installation Year

Property Taxes

Copies of recent tax bills
Tax appeal records (with all legal papers)
Other tax information

Tenant(s) Information

Rent Roll
Current leases, options, addendums
Current Insurance Policies
Applications and related information
 Credit check
 Security deposits
 Other deposits
Copies of recent letters and notices
Current account status
 Delinquency / Receivables

Vendor Information

Contact information
 Name, Phone Number, Email Address
Copy of most recent invoice
 Include Account Number
Current Billing Schedule

~ Your Commercial Property Management Partner ~